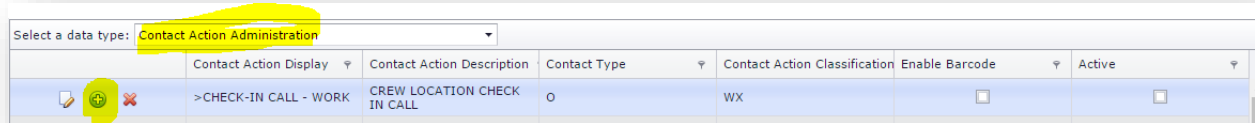


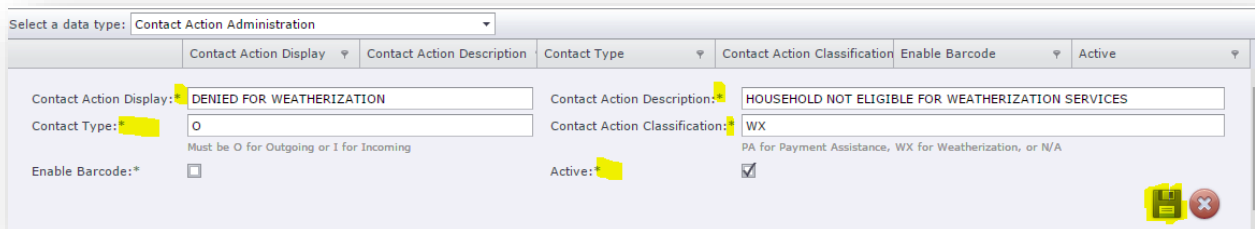
## How to track WX Denial in ServTrag

You can create a contact action specifically to track WX denials by going to **Admin>Data Admin** and selecting data type: **Contact Action Administration**. Click on the *plus icon* to **add** a new contact action.



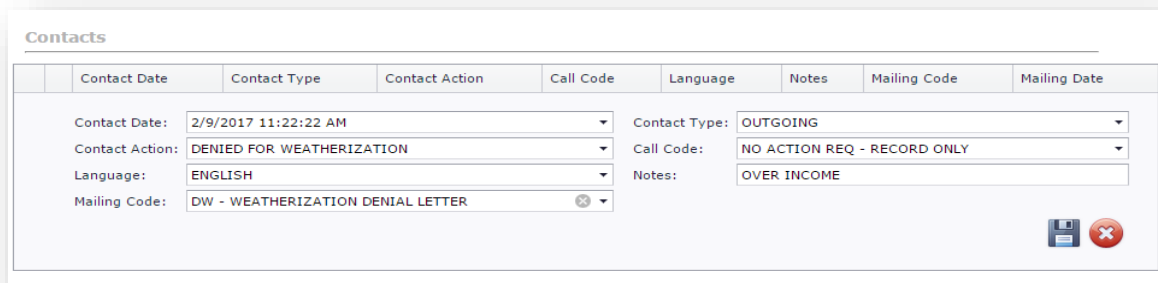
Select a data type:	Contact Action Display	Contact Action Description	Contact Type	Contact Action Classification	Enable Barcode	Active
	>CHECK-IN CALL - WORK	CREW LOCATION CHECK IN CALL	O	WX	<input type="checkbox"/>	<input type="checkbox"/>

Complete the fields required, and check the box “active”. Finish by click on the *floppy disc icon* to **save**.



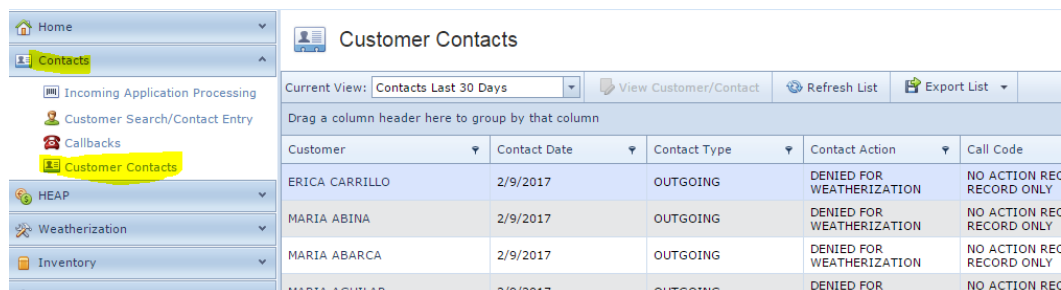
Select a data type:	Contact Action Display	Contact Action Description	Contact Type	Contact Action Classification	Enable Barcode	Active
	DENIED FOR WEATHERIZATION	HOUSEHOLD NOT ELIGIBLE FOR WEATHERIZATION SERVICES	O	WX	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Within the Customer Record, you can use the Contact Entry Note feature to track customers who are denied for weatherization services. You have the option to document additional information in the **Notes** section as well as creating a **mail letter**.



Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
2/9/2017 11:22:22 AM	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	OVER INCOME	DW - WEATHERIZATION DENIAL LETTER	

To run a report on Denied weatherization customers entered: Go to **Contacts> Customer Contacts**



Customer	Contact Date	Contact Type	Contact Action	Call Code
ERICA CARRILLO	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ RECORD ONLY
MARIA ABINA	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ RECORD ONLY
MARIA ABARCA	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ RECORD ONLY
MARTA AGUIJAR	2/9/2017	OUTGOING	DENIED FOR	NO ACTION REQ

Click on the *filter icon* for **Contact Action** and check the box for “Denied for Weatherization” (Note: this can differ based on what you named the Contact Action) and click **OK**.

Customer Contacts

Current View: **Contacts Last 30 Days** View Customer/Contact Refresh List Export List

Drag a column header here to group by that column

	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes
LO	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	(Select All)		ALREADY WEATHERIZED
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	<input checked="" type="checkbox"/> DENIED FOR WEATHERIZATION		ALREADY WEATHERIZED
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	<input type="checkbox"/> PROGRAM/APPLICATION INFO GIVEN		ALREADY WEATHERIZED
A	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION			OVER INCOME
R	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION			ALREADY WEATHERIZED
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION			OVER INCOME
ALEZ	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION			OVER INCOME
OZA	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION		ENGLISH	
	1/10/2017	OUTGOING	PROGRAM/APPLICATION INFO GIVEN		ENGLISH	ADDED FROM APPLICATION E

**Filter Menu:**  
☐ (Select All)  
☒ DENIED FOR WEATHERIZATION  
☐ PROGRAM/APPLICATION INFO GIVEN

Next, click on the **link** located at the bottom of the screen to open the *filter builder*. Here you are going to set the date parameter for your report.

Customer Contacts

Current View: **Contacts Last 30 Days** View Customer/Contact Refresh List Export List

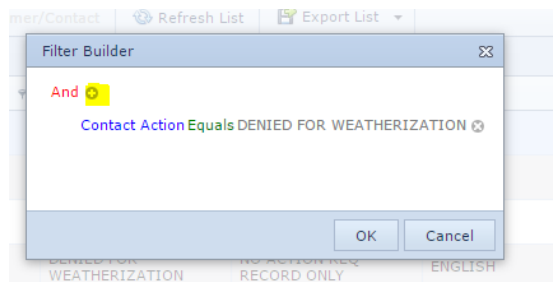
Drag a column header here to group by that column

	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes
LO	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	ALREADY WEATHERIZED
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	ALREADY WEATHERIZED
A	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	ALREADY WEATHERIZED
R	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	OVER INCOME
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	ALREADY WEATHERIZED
ALEZ	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	OVER INCOME
OZA	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	

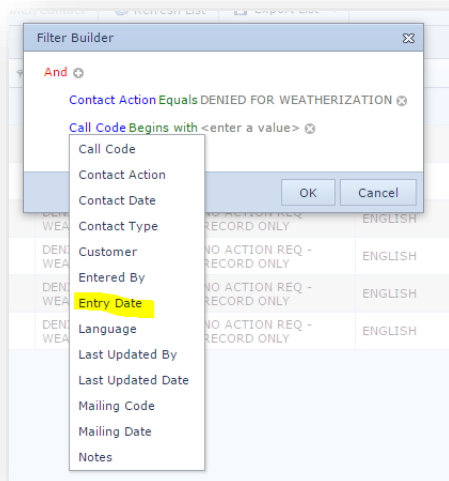
Page 1 of 1 (7 items) **1**

☒ **[Contact Action] Equals "DENIED FOR WEATHERIZATION"**

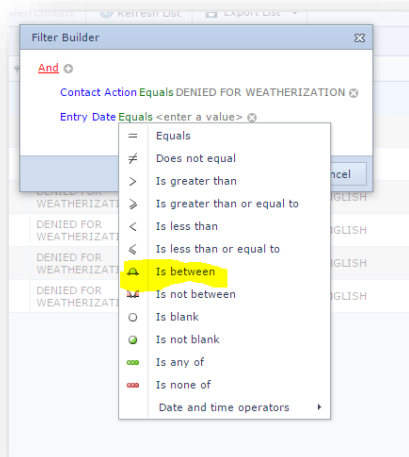
Click on the *plus icon* to set your date parameters.



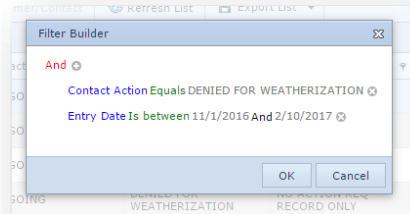
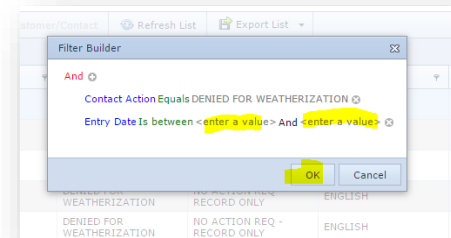
Click on “Call Code” and select “Entry Date”



Click on “Equals” and select “Is Between”



Enter a start and end date and click “OK”



Your results will generate in the screen. To **print** report click on the **Export List** tab. A drop down menu will appear and select from the options.

